WINE INTELLIGENCE

AUSTRALIA SOLA

Opportunities for Sustainable, Organic and Low / No alcohol wine workshop

March 2021

WHAT IS THIS WEBINAR GOING TO FOCUS ON?

- Sustainable and organic wines in Australia
- Low and no alcohol wines in Australia

S ustainable wine

O rganic wine

L ower alcohol wine

A lternative wine

4 MAIN TAKEAWAYS FROM TODAY

1. **Environmental consciousness led by local buying**
2. **Wine's role in the sustainability conversation**
3. **Sustainability characteristics have potential**
4. **Low and no alcohol wine styles are still niche areas**

Source: Wine Intelligence, Vinitrac® Canada, October 2017, March 2019 and October 2020 (n≥1,013), Canadian regular wine drinkers

1. ENVIROMENTAL CONSCIOUSNESS LED BY LOCAL BUYING

Other than a strong association to buy local, Australian regular wine drinkers are in line with global standards for views on sustainability

General attitudes towards sustainability: Worldview

% who agrees with each of the following statements

Base = All regular wine drinkers in Australia, Belgium, Canada, Japan, Netherlands, Sweden, Switzerland, UK and US (n≥500)

	Global Weighted Score	Australia
Sample size n=	*9,215*	*1,000*
I worry about Climate Change and try to minimise my personal impact	**55%**	58%
I try to buy food that is grown or produced locally (in the region where I live)	**54%**	63%
I am willing to pay more for a product that is sustainably produced	**40%**	41%
I always buy sustainable products where possible	**39%**	40%
I am willing to give up convenience in return for a product that is sustainably produced	**38%**	41%
I actively eat more / exclusively vegetarian or vegan food	**27%**	28%

Red / Blue: Statistically significantly higher / lower than the global weighted score at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, October 2020 (n≥500), Australian, Belgium, Canadian, Japanese, Dutch, Swedish, Swiss, UK and US regular wine drinkers

1. ENVIROMENTAL CONSCIOUSNESS LED BY LOCAL BUYING

Purchase intentions show a clear contrast between young and old

General attitudes towards sustainability: By gender and age

% who agrees with each of the following statements
Base = All Australian regular wine drinkers (n=1,000)

	All Australian regular wine drinkers	Gender		Age		
		Male	Female	18-34	35-54	55+
n=	*1,000*	*536*	*464*	*276*	*374*	*350*
I try to buy food that is grown or produced locally (in the region where I live)	63%	61%	64%	61%	60%	67%
I worry about Climate Change and try to minimise my personal impact	58%	57%	59%	58%	61%	53%
I expect the brands I buy to support social causes	43%	44%	41%	55%	46%	29%
I am willing to give up convenience in return for a product that is sustainably produced	41%	44%	37%	50%	47%	27%
I am willing to pay more for a product that is sustainably produced	41%	43%	39%	55%	44%	27%
I always buy sustainable products where possible	40%	42%	38%	54%	43%	27%
I actively eat more / exclusively vegetarian or vegan food	28%	29%	27%	45%	31%	12%

19-34s are twice as likely to look for sustainability and demand brands support social causes

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

1. ENVIROMENTAL CONSCIOUSNESS LED BY LOCAL BUYING

Contrasting overall sustainability purchase intentions between lower and higher involved wine consumers

General attitudes towards sustainability: By wine involvement

% who agrees with each of the following statements

Base = All Australian regular wine drinkers (n=1,000)

	All Australian regular wine drinkers	Wine Involvement: Low	Wine Involvement: Medium	Wine Involvement: High
n=	*1,000*	*250*	*391*	*358*
I try to buy food that is grown or produced locally (in the region where I live)	63%	51%	58%	75%
I worry about Climate Change and try to minimise my personal impact	58%	41%	59%	68%
I expect the brands I buy to support social causes	43%	28%	41%	55%
I am willing to give up convenience in return for a product that is sustainably produced	41%	22%	42%	53%
I am willing to pay more for a product that is sustainably produced	41%	23%	40%	55%
I always buy sustainable products where possible	40%	29%	37%	52%
I actively eat more / exclusively vegetarian or vegan food	28%	18%	24%	40%

Note the chasm between low and high involved wine consumers when it comes to willingness to pay more for any product that is 'sustainable' or supports social causes

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

2. WINE'S ROLE IN THE SUSTAINABILITY CONVERSATION

Wine is more linked to sustainability in Australia than elsewhere

Glass viewed as 'sustainable' everywhere, even more so in Australia

Wine = sustainable is currently a more wide spread view in Australia than globally

Attitudes towards sustainability in wine: Worldview

% who agrees with each of the following statements

Base = All regular wine drinkers in Australia, Belgium, Canada, Japan, Netherlands, Sweden, Switzerland, UK and US (n≥500)

	Global Weighted Score	Australia
Sample size n=	*9,215*	*1,000*
Glass wine bottles are a sustainable form of wine packaging	**55%**	61%
I only trust the sustainability of wines if they have official certification	**43%**	47%
Wine is a more sustainable product compared with other drinks	**42%**	46%
Sustainable wine has less chemicals than other wine	**39%**	40%
I'm willing to pay more for sustainable wine	**37%**	37%
Wine in a bag-in-box is a sustainable form of wine packaging	**35%**	35%
I will always buy sustainable wines when given the choice	**33%**	35%
Sustainable wine is always organically produced	**29%**	33%

Red / Blue: Statistically significantly higher / lower than the global weighted score at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, October 2020 (n≥500), Australian, Belgium, Canadian, Japanese, Dutch, Swedish, Swiss, UK and US regular wine drinkers

2. WINE'S ROLE IN THE SUSTAINABILITY CONVERSATION

Younger consumers are more likely to agree with a variety of statements on sustainability in wine

Attitudes towards sustainability in wine: By gender and age

% who agrees with each of the following statements
Base = All Australian regular wine drinkers (n=1,000)

		Gender		Age		
	All Australian regular wine drinkers	Male	Female	18-34	35-54	55+
n=	*1,000*	*536*	*464*	*276*	*374*	*350*
Glass wine bottles are a sustainable form of wine packaging	61%	63%	59%	59%	64%	61%
I only trust the sustainability of wines if they have official certification	47%	50%	44%	55%	50%	38%
Wine is a more sustainable product compared with other drinks	46%	51%	40%	55%	49%	36%
Sustainable wine has less chemicals than other wine	40%	41%	39%	48%	47%	26%
I'm willing to pay more for sustainable wine	37%	38%	35%	52%	40%	21%
I will always buy sustainable wines when given the choice	35%	38%	32%	48%	41%	20%
Wine in a bag-in-box is a sustainable form of wine packaging	35%	37%	32%	48%	37%	21%
Sustainable wine is always organically produced	33%	35%	30%	46%	37%	18%

Note the contrast between under 55s and over 55s

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

2. WINE'S ROLE IN THE SUSTAINABILITY CONVERSATION

Higher involved consumers are more likely to agree with a variety of statements on sustainability in wine

Attitudes towards sustainability in wine: By involvement

% who agrees with each of the following statements

Base = All Australian regular wine drinkers (n=1,000)

	All Australian regular wine drinkers	Wine Involvement		
		Low	Medium	High
n=	*1,000*	*250*	*391*	*358*
Glass wine bottles are a sustainable form of wine packaging	61%	43%	60%	76%
I only trust the sustainability of wines if they have official certification	47%	30%	44%	62%
Wine is a more sustainable product compared with other drinks	46%	25%	43%	64%
Sustainable wine has less chemicals than other wine	40%	26%	34%	56%
I'm willing to pay more for sustainable wine	37%	20%	34%	51%
I will always buy sustainable wines when given the choice	35%	20%	32%	50%
Wine in a bag-in-box is a sustainable form of wine packaging	35%	22%	30%	49%
Sustainable wine is always organically produced	33%	15%	28%	50%

Sustainability conversation only currently relevant for highly involved wine consumers

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

3. SUSTAINABILITY CHARACTERISTICS HAVE POTENTIAL

Organic wine remains the wine type with the higher opportunity index in Australia

Australia Alternative Wine Opportunity Index

	Type of wine	Base = All sample	Base = Those who are aware of the following types of wine			2020 opportunity index	2019 opportunity index	2019 rank difference
		Awareness	Sought to purchase	Future purchase consideration	Affinity			
1st	Organic wine	50%	21%	53%	42%	42.3	42.0	=
2nd	Sustainably produced wine	28%	21%	62%	62%	42.2	38.4	1 ↑
3rd	Preservative free wine	36%	18%	57%	51%	40.2	40.3	-1 ↓
4th	Lower alcohol wine	54%	17%	40%	37%	39.4	38.1	=
5th	Environmentally friendly wine	25%	24%	58%	55%	39.1	35.7	=
6th	Fairtrade wine	19%	19%	59%	56%	35.9	32.8	1 ↑
7th	Sulphite free wine	25%	19%	58%	48%	35.5	34.2	-1 ↓
8th	Wine from a carbon-neutral winery	13%	22%	54%	53%	32.8	28.5	2 ↑
9th	Non-alcoholic wine	57%	11%	23%	18%	31.0	29.4	=
10th	Orange / skin contact wine	8%	26%	45%	42%	27.2	24.9	1 ↑
11th	Biodynamic wine	10%	19%	46%	39%	25.8	29.5	-3 ↓
12th	Vegan wine	19%	20%	33%	26%	23.2	23.6	=
13th	Vegetarian wine	12%	15%	33%	28%	20.5	23.4	=

Source: Wine Intelligence, Vinitrac® Australia, March 2019 and October 2020 (n=1,000), Australian regular wine drinkers

3. SUSTAINABILITY CHARACTERISTICS HAVE POTENTIAL

Older consumers are more aware of organic and sulphite free wine, whilst younger consumers know more niche alternative wines

Alternative wines awareness

% who are aware of the following types of wine
Base = All Australian regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All Australian regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	*1,000*	*536*	*464*	*276*	*374*	*350*	*250*	*391*	*358*
Organic wine	50%	50%	50%	46%	46%	58%	39%	50%	58%
Preservative free wine	36%	34%	39%	32%	35%	41%	29%	36%	42%
Sustainably produced wine	28%	30%	26%	31%	26%	28%	19%	30%	33%
Environmentally friendly wine	25%	28%	23%	28%	24%	24%	17%	25%	32%
Sulphite free wine	25%	23%	26%	18%	24%	30%	19%	21%	32%
Vegan wine	19%	20%	19%	25%	20%	14%	13%	16%	26%
Fairtrade wine	19%	18%	19%	20%	16%	20%	14%	18%	23%
Wine from a carbon-neutral winery	13%	16%	9%	19%	14%	7%	6%	11%	20%
Vegetarian wine	12%	12%	12%	20%	10%	8%	8%	11%	17%
Biodynamic wine	10%	12%	8%	13%	10%	8%	7%	7%	15%
Orange / skin contact wine	8%	9%	7%	12%	8%	4%	2%	6%	13%
None of these	14%	14%	14%	10%	16%	14%	21%	15%	8%

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

3. SUSTAINABILITY CHARACTERISTICS HAVE POTENTIAL

Relatively low levels of purchase intent among those aware of the products – note the lack of differentiation between age cohorts and involvement levels

Alternative wines purchase intent

% who have sought to purchase the following types of wine in the past 6 months
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	18-34	35-54	55+	Low	Medium	High
Orange / skin contact wine	26%	29%	23%	32%	28%	12%	21%	23%	29%
Environmentally friendly wine	24%	25%	24%	31%	29%	14%	23%	24%	26%
Wine from a carbon-neutral winery	22%	22%	21%	28%	23%	7%	19%	23%	22%
Organic wine	21%	25%	17%	43%	18%	11%	11%	24%	23%
Sustainably produced wine	21%	26%	15%	32%	24%	9%	22%	21%	22%
Vegan wine	20%	20%	20%	31%	20%	2%	20%	19%	20%
Fairtrade wine	19%	22%	16%	27%	31%	3%	12%	19%	22%
Sulphite free wine	19%	21%	17%	24%	23%	13%	13%	20%	21%
Biodynamic wine	19%	20%	16%	19%	26%	7%	18%	18%	19%
Preservative free wine	18%	18%	18%	25%	21%	11%	19%	16%	20%
Vegetarian wine	15%	17%	11%	15%	22%	3%	11%	10%	19%
None of these	56%	51%	62%	40%	54%	72%	67%	56%	49%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

3. SUSTAINABILITY CHARACTERISTICS HAVE POTENTIAL

Relatively high affinity levels compared with purchase intent suggest a lack of connection between the product attributes and actual purchase desire

wine intelligence

Alternative wines affinity

% who think the following types of wine are right for people like them
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	18-34	35-54	55+	Low	Medium	High
Sustainably produced wine	62%	58%	68%	69%	62%	57%	68%	63%	60%
Fairtrade wine	56%	55%	56%	59%	69%	41%	52%	54%	58%
Environmentally friendly wine	55%	58%	53%	60%	58%	49%	64%	54%	54%
Wine from a carbon-neutral winery	53%	53%	53%	58%	57%	36%	47%	58%	51%
Preservative free wine	51%	48%	55%	53%	51%	50%	57%	56%	44%
Sulphite free wine	48%	43%	53%	44%	54%	45%	50%	49%	47%
Organic wine	42%	42%	42%	54%	46%	31%	34%	41%	47%
Orange / skin contact wine	42%	41%	43%	38%	52%	30%	40%	40%	43%
Biodynamic wine	39%	30%	56%	39%	45%	32%	23%	46%	41%
Vegetarian wine	28%	24%	32%	30%	32%	19%	21%	29%	29%
Vegan wine	26%	23%	28%	34%	28%	10%	32%	23%	25%
None of these	25%	28%	23%	20%	23%	32%	36%	23%	21%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

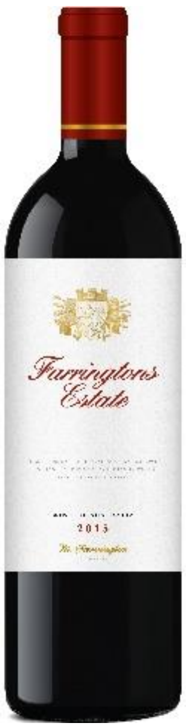
vinitrac

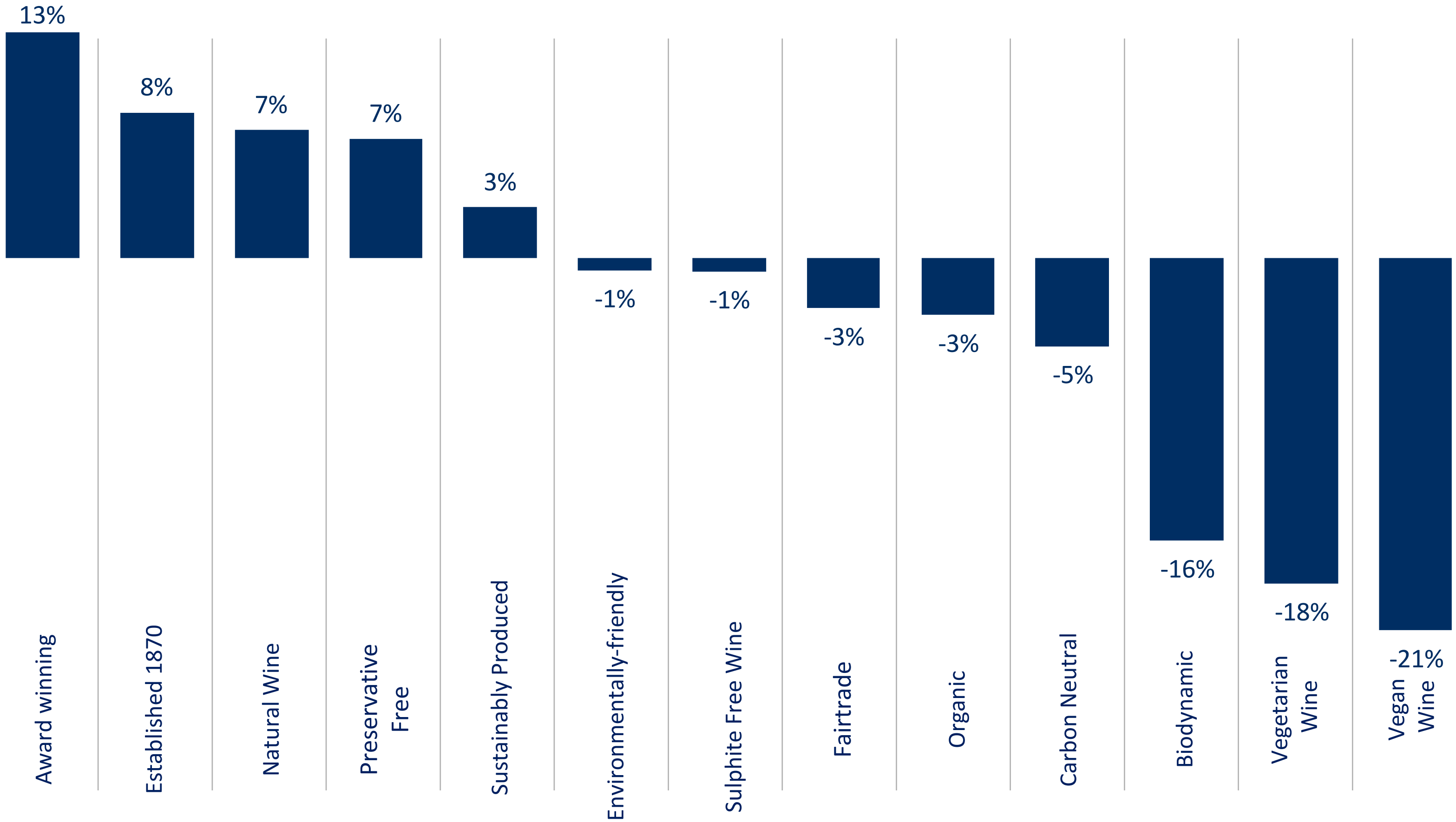
PURCHASE INTENT OF WINE TYPES

Bottles showing won awards are the most successful bottles amongst the tested range; on the other hand, bottles showing vegetarian and vegan statements are less likely to be purchased than a 'no claim' bottle

Intent to purchase: Net score compared with 'no claim'

% who would be likely or very likely to buy each wine minus those Likely or very likely to buy the No Claim wine
Base = All Australian regular wine drinkers (n=1,000)





4. LOW AND NO ALCOHOL WINE STYLES ARE STILL NICHE AREAS

Relatively few Australians are reducing their alcohol consumption currently, and a small minority are doing so by switching to low alcohol and no alcohol drinks

Alcohol moderation

% who selected the following statements
Base = All Australian regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All Australian regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	*1,000*	*536*	*464*	*276*	*374*	*350*	*250*	*391*	*358*
I'm NOT actively reducing the amount of alcohol I drink	54%	53%	55%	44%	57%	60%	59%	51%	55%
I'm actively reducing the amount of alcohol I drink by not drinking alcohol at some occasions	28%	28%	27%	28%	24%	31%	29%	29%	25%
I'm actively reducing the amount of alcohol I drink by switching to lower alcohol options at some occasions	18%	22%	13%	31%	17%	9%	15%	18%	20%
I'm actively reducing the amount of alcohol I drink by switching to non-alcoholic drinks at some occasions	15%	15%	15%	23%	13%	11%	9%	17%	17%

Younger consumers are much more likely to be interested in lower alcohol options

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

4. LOW AND NO ALCOHOL WINE STYLES ARE STILL NICHE AREAS

High awareness for low and no alcohol wine, but relatively less among younger consumers

Alternative wines awareness

% who are aware of the following types of wine
Base = All Australian regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All Australian regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	1,000	536	464	276	374	350	250	391	358
Non-alcoholic wine	57%	54%	60%	50%	51%	69%	54%	59%	56%
Lower alcohol wine	54%	52%	57%	48%	50%	63%	47%	54%	60%
Organic wine	50%	50%	50%	46%	46%	58%	39%	50%	58%
Preservative free wine	36%	34%	39%	32%	35%	41%	29%	36%	42%
Sustainably produced wine	28%	30%	26%	31%	26%	28%	19%	30%	33%
Environmentally friendly wine	25%	28%	23%	28%	24%	24%	17%	25%	32%
Sulphite free wine	25%	23%	26%	18%	24%	30%	19%	21%	32%
Vegan wine	19%	20%	19%	25%	20%	14%	13%	16%	26%
Fairtrade wine	19%	18%	19%	20%	16%	20%	14%	18%	23%
Wine from a carbon-neutral winery	13%	16%	9%	19%	14%	7%	6%	11%	20%
Vegetarian wine	12%	12%	12%	20%	10%	8%	8%	11%	17%
Biodynamic wine	10%	12%	8%	13%	10%	8%	7%	7%	15%
Orange / skin contact wine	8%	9%	7%	12%	8%	4%	2%	6%	13%
None of these	14%	14%	14%	10%	16%	14%	21%	15%	8%

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

4. LOW AND NO ALCOHOL WINE STYLES ARE STILL NICHE AREAS

Relatively more purchase interest among younger consumers who are aware of no alcohol wine

Alternative wines intent to purchase

% who have sought to purchase the following types of wine in the past 6 months
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	18-34	35-54	55+	Low	Medium	High
Orange / skin contact wine	26%	29%	23%	32%	28%	12%	21%	23%	29%
Environmentally friendly wine	24%	25%	24%	31%	29%	14%	23%	24%	26%
Wine from a carbon-neutral winery	22%	22%	21%	28%	23%	7%	19%	23%	22%
Organic wine	21%	25%	17%	43%	18%	11%	11%	24%	23%
Sustainably produced wine	21%	26%	15%	32%	24%	9%	22%	21%	22%
Vegan wine	20%	20%	20%	31%	20%	2%	20%	19%	20%
Fairtrade wine	19%	22%	16%	27%	31%	3%	12%	19%	22%
Sulphite free wine	19%	21%	17%	24%	23%	13%	13%	20%	21%
Biodynamic wine	19%	20%	16%	19%	26%	7%	18%	18%	19%
Preservative free wine	18%	18%	18%	25%	21%	11%	19%	16%	20%
Lower alcohol wine	17%	20%	15%	29%	17%	10%	11%	16%	22%
Vegetarian wine	15%	17%	11%	15%	22%	3%	11%	10%	19%
Non-alcoholic wine	11%	14%	8%	16%	14%	6%	7%	10%	14%
None of these	56%	51%	62%	40%	54%	72%	67%	56%	49%

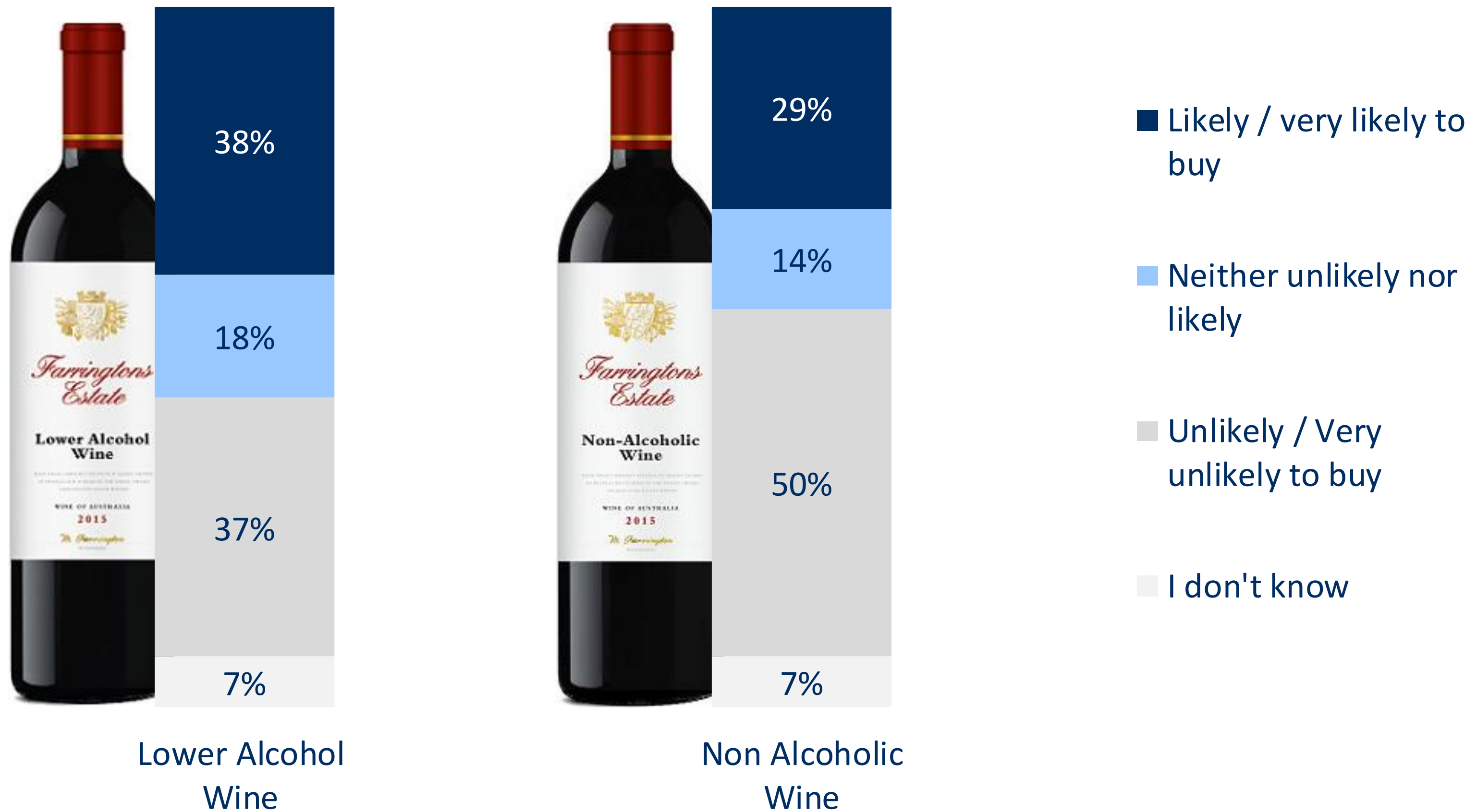
: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

4. LOW AND NO ALCOHOL WINE STYLES ARE STILL NICHE AREAS

Other a third of consumers say they would buy low and no alcohol wine

Intent to purchase

% who would be likely or very likely to buy each wine
Base = All Australian regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

4. LOW AND NO ALCOHOL WINE STYLES ARE STILL NICHE AREAS

Lower alcohol wine in Australia is perceived as not really wine by around a third of the wine drinking population

Lower alcohol wine barriers to purchase: By gender, age and involvement

% who selected the following statements as reasons not to buy lower alcohol wines
Base = Those who are aware of lower alcohol wine but have not sought to buy in the past 6 months or would not consider buying it in the future

		Gender		Age			Wine Involvement		
		Male	Female	18-34	35-54	55+	Low	Medium	High
It's not really wine	28%	27%	30%	37%	27%	25%	28%	29%	28%
My favourite wine does not come in a lower alcohol version	25%	27%	24%	26%	22%	28%	21%	26%	28%
I dislike the taste	25%	24%	25%	24%	26%	24%	12%	31%	27%
Does not contain enough alcohol to feel an effect	22%	21%	23%	43%	17%	17%	24%	24%	19%
Lower quality than standard wine	21%	22%	20%	28%	22%	18%	20%	17%	26%
Higher price than standard wine	21%	21%	20%	35%	14%	20%	21%	24%	18%
Poor quality wines	18%	20%	16%	27%	17%	15%	16%	17%	21%
Lower alcohol wines are an aberration	14%	15%	14%	22%	7%	17%	11%	15%	16%
My friends don't seem to drink it	14%	15%	13%	31%	9%	10%	18%	10%	16%
It's not clear from the bottle what it is	10%	11%	10%	22%	6%	9%	7%	11%	12%
Difficult to find where I shop for wine	8%	9%	7%	22%	8%	3%	9%	8%	9%
I'm not aware of these products	8%	10%	6%	15%	5%	7%	13%	7%	5%
I would be embarrassed to be seen drinking it	7%	8%	6%	16%	3%	7%	5%	10%	6%
They are mass produced wines	7%	7%	6%	8%	7%	6%	4%	7%	8%
Other	2%	2%	1%	2%	1%	2%	1%	2%	2%
None of these / no opinion	8%	7%	9%	2%	9%	11%	14%	4%	8%
I can't think of any reason not to buy lower alcohol wines	12%	12%	13%	0%	14%	16%	12%	16%	10%

Note the consistency of view across gender and involvement

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n=1,000), Australian regular wine drinkers

4 MAIN TAKEAWAYS FROM TODAY

1. **Environmental consciousness led by local buying**

2. **Wine's role in the sustainability conversation**

3. **Sustainability characteristics have potential**

4. **Low and no alcohol wine styles are still niche areas**

Source: Wine Intelligence, Vinitrac® Canada, October 2017, March 2019 and October 2020 (n≥1,013), Canadian regular wine drinkers

Key Wine Intelligence contacts from the webinar:

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